Neighborhood Assistance Program Reporting Instructions

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Required NAP Reports

The following reports are required:

1. 60% Benchmark Report
2. 100% Benchmark Report
3. Close-out Report

Report Name	Due Date	Report Type
60% Benchmark Report	**January 13, 2020**	**IHCDAOnline**
100% Benchmark Report	**April 13, 2020**	**IHCDAOnline**
Close-Out Report	**September 30, 2020**	**Jotform**

If the NAP program administrator or NAP agency needs information for accessing their account on IHCDAOnline, including registering for the first time, please refer to the Partner's Guide to IHCDAOnline, which can be found here: https://online.ihcda.in.gov/AuthorityOnline/Links.htm . If an agency has any issues following the instructions in the Partner's Guide, please email claims@ihcda.in.gov.

The Jotform link for the Close-out Report will be sent out when it is available. In addition, the link will be posted on the NAP website.

60% Benchmark Report -Due January 13, 2020

60% Benchmark Report is the first report of the NAP cycle and is due six (6) months after the award date. It includes all donations received between July 1 and December 31. This report must reflect a sale of a minimum of 60% of the organization's total tax credit allocation. This report is electronic and is submitted via IHCDAOnline. If an organization fails to distribute at least 60% of its allocation, or fails to submit the report on time, it will lose eligibility for the next round of NAP credits and it may have any unused credits deallocated. If at any time you have issues with the reporting system, email IHCDA's Financial Operations department at claims@ihcda.in.gov. Program staff will not be able to assist you.

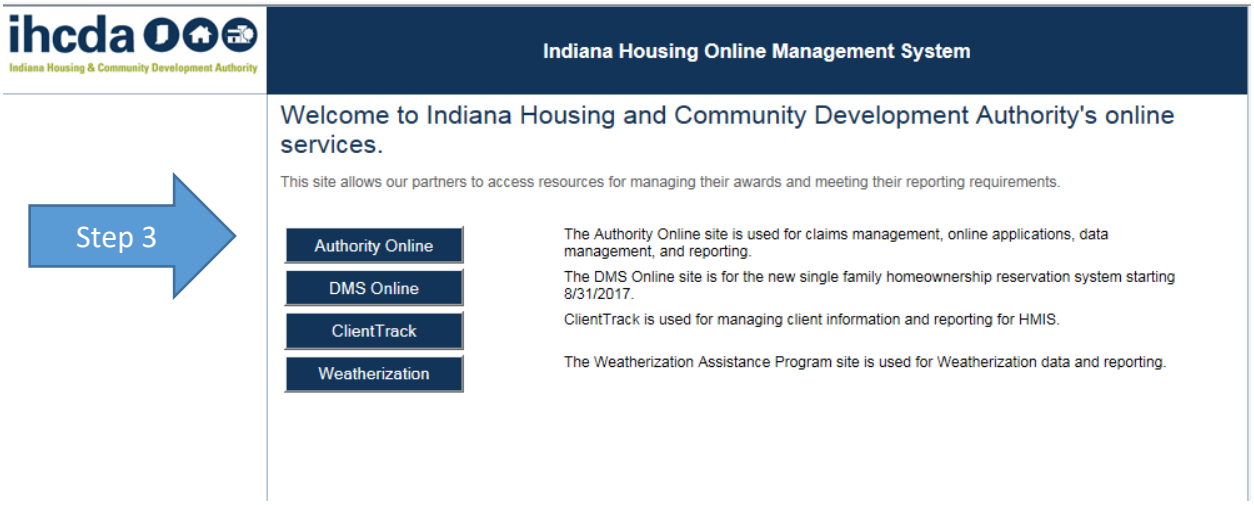
Step 1: Gather all donations received between July 1 and December 31. Agencies should be collecting donor information as they donate, so a list can be ready for the benchmark report. Before submitting a report, it's a good practice to review the information to ensure it is correct.

You will need their name, social security number, the dollar amount donated and the date of donation

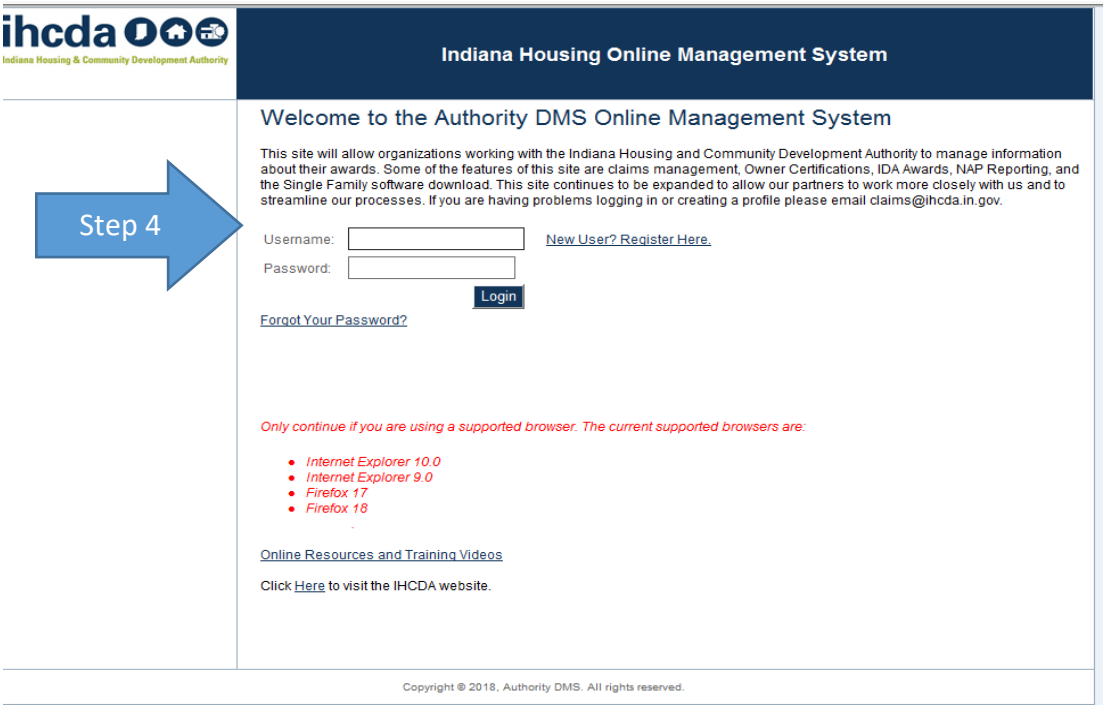
Please note there is no form that you are required to submit to IHCDA. Submitting the 60% and 100% Benchmark Report in IHCDAOnline is the only donor information that IHCDA requires. However, agencies should keep copies of the Donor Contribution Form for each donation.

Step 2: Access the **Online.IHCDA.in.gov** website

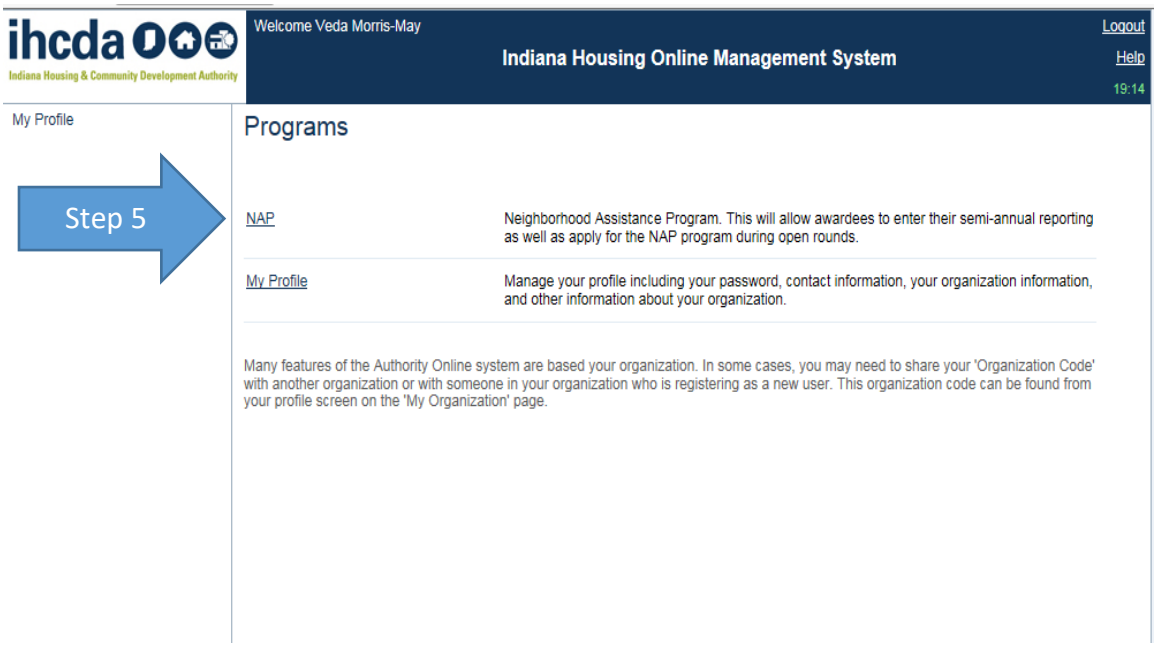
Step 3: Click on "Authority Online"



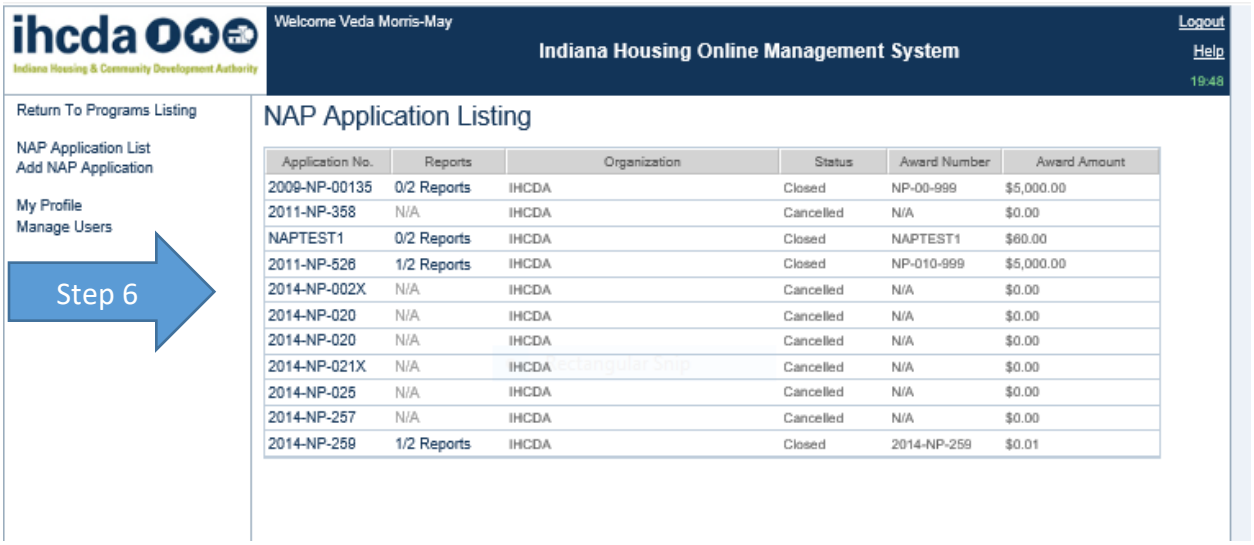
Step 4: Enter Log-in information -"Username" and "Password"



Step 5: <u>Select NAP.</u> This page may look different depending on the types of awards and contracts the organization has with IHCDA.



Step 6: Choose the correct NAP Contract from the list



This will bring you to your agency's cover page for your NAP your agency's NAP application's cover page

Step 7: Select NAP Semi-Annual reporting

Step 8: Fill out the report

a) The period for the 60% Benchmark report is “First Half.” The donations must be made between July1-December 31. **Do not enter names for the 60% benchmark Report outside of this timeframe.**

b) Enter the contribution information for each donor and **double check that the information entered is correct.** Incorrect information could put your donor’s tax credit and your organizations NAP eligibility at risk.

Name

Social Security Number

Address

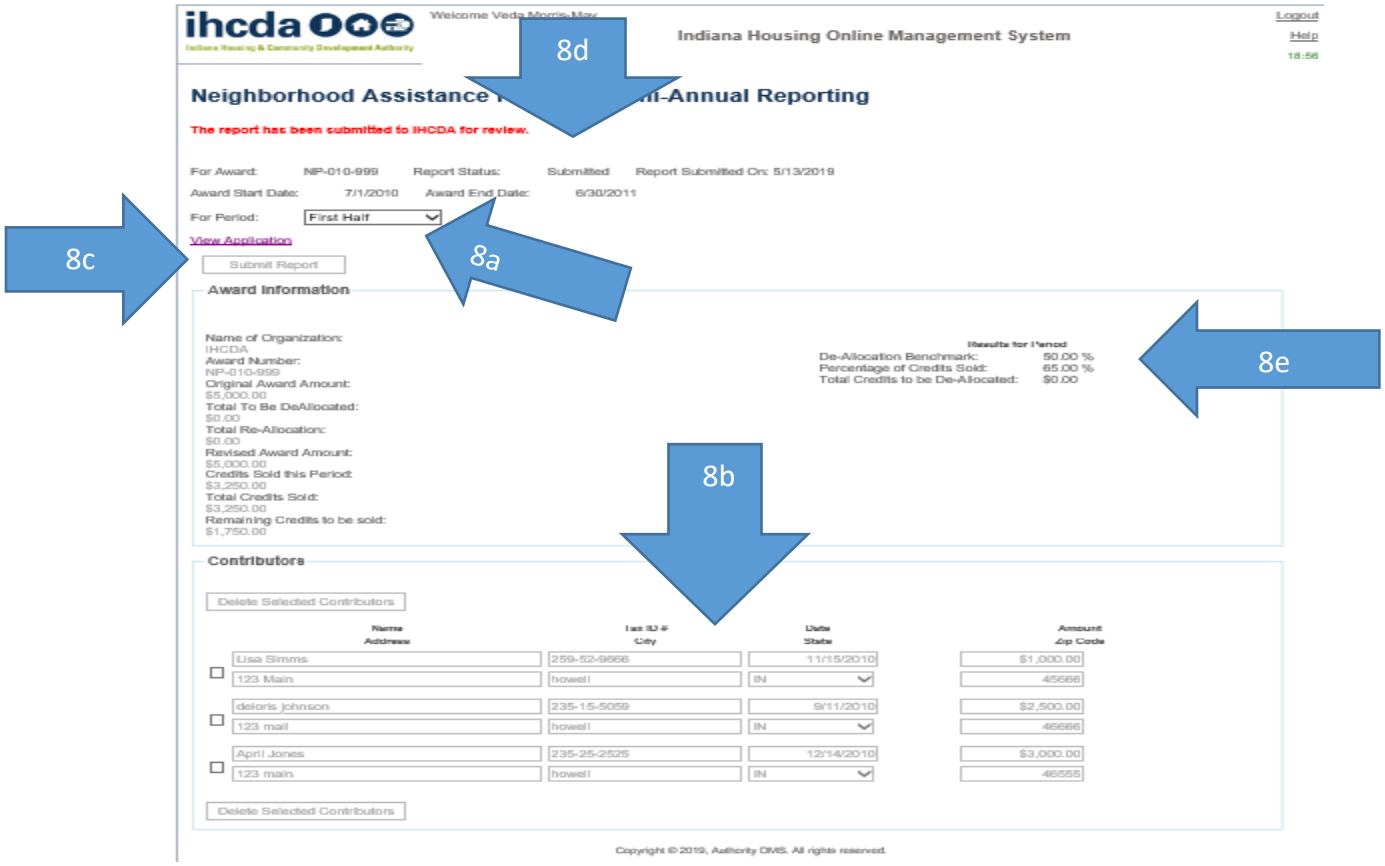
Donation Amount that is eligible for a NAP credit: the lessor of the full amount donated OR $25,000 OR half of the credits your agency has remaining

Donation Date

c) Hit the “Submit Report” once all of the donor information has been entered.

d) The report will show “Submitted” at the top right-hand corner once the process has been completed. **PLEASE CHECK FOR THAT BEFORE EMAILING IHCDA STAFF TO ASK IF YOUR REPORT WAS CORRECTLY SUBMITTED.**

e) Once you hit submit the report will show the results for the period which includes the De-allocation benchmark, percentage of credits distributed and the total credits to be de-allocated if the benchmark is not met.



9. Donation Entry Information

The total that you see in IHCDAOnline for your organization will be the amount of tax credits that your organization has distributed. For example:

a. Your agency was allocated $5,000 in tax credits.

b. You enter the following Donor Contributions totaling $6,500:

   i. Lisa Simms 123 Main St, Howell IN, 11111, ss# 000-00-0000, $1,000 Donation
   ii. Deloris Johnson 123 Main St., Howell, IN 22222, ss# 111-11-1111, $2,500 Donation
   iii. April Jones, 123 Main St. Howell, IN 33333, ss# 333-33-3333, $3,000.00 Donation

c. After entering all of the Donor contributions above in IHCDAOnline it will show that $3,250 in tax credits have been distributed.

   i. Donations/2 = Tax Credits distributed. $6,500.00/2 = $3,250.

d. You have distributed $3,250 of your $5,000 awarded NAP credits. This would result in using 65% of your tax credits being distributed, which means your organization has met the 60% Benchmark requirement.

10. Below is a sample of a report that was submitted that did not meet the 60% benchmark criteria and may be deallocated credits.

a. Your agency was allocated $5,000 in tax credits.

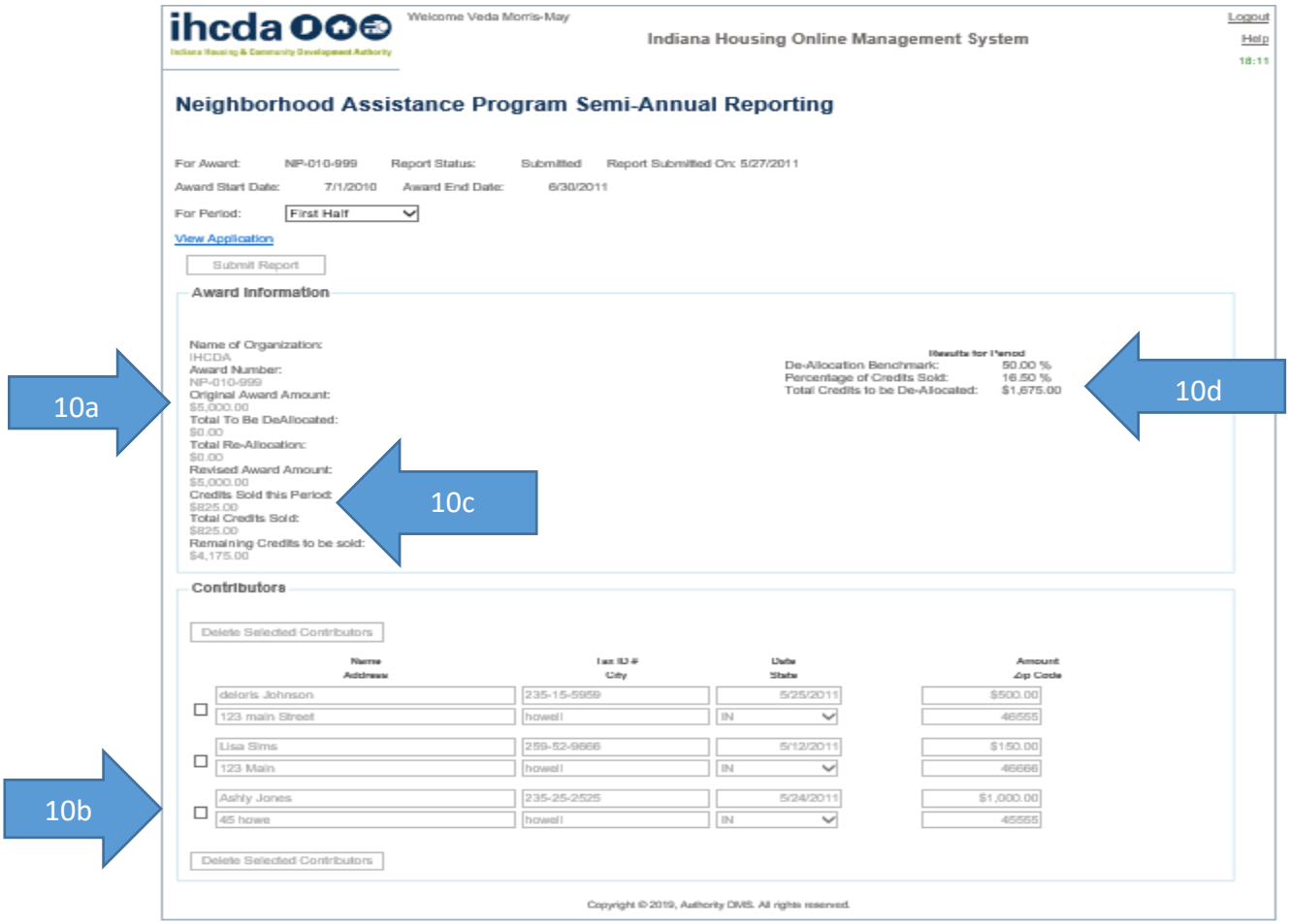
b. You enter the following Donor Contributions totaling $1,650.00:

   i. Lisa Simms 123 Main St, Howell IN, 11111, ss# 000-00-0000, $500 Donation
   ii. Deloris Johnson 123 Main St., Howell, IN 22222, ss# 111-11-1111, $150 Donation
   iii. April Jones, 123 Main St. Howell, IN 33333, ss# 333-33-3333, $1,000.00 Donation

c. After entering all of the Donor contributions above In IHCDAOnline by December 31 it will show that $825 in tax credits have been distributed.

   iv. Donations/2 = Tax Credits distributed. $1,650.00/2 = $825

d. You have distributed $825 out of $5,000 in NAP credits. This would result in using 16.5% of your tax credits being distributed, which means your organization has not met the 60% Benchmark requirement.



100% Benchmark Report – Due April 13, 2020

The 100% Benchmark Report includes all donations received between January 1, 2021 and March 31. This report must reflect a sale of a minimum of 100% of the organization's total tax credit allocation. This report is electronic and is submitted via IHCDAOnline. If an organization fails to distribute 100% of its allocation, it will lose eligibility for the next round of NAP credits.

If at any time you have issues with the reporting system, email IHCDA's Financial Operations department at claims@ihcda.in.gov. Program staff will not be able to assist you.

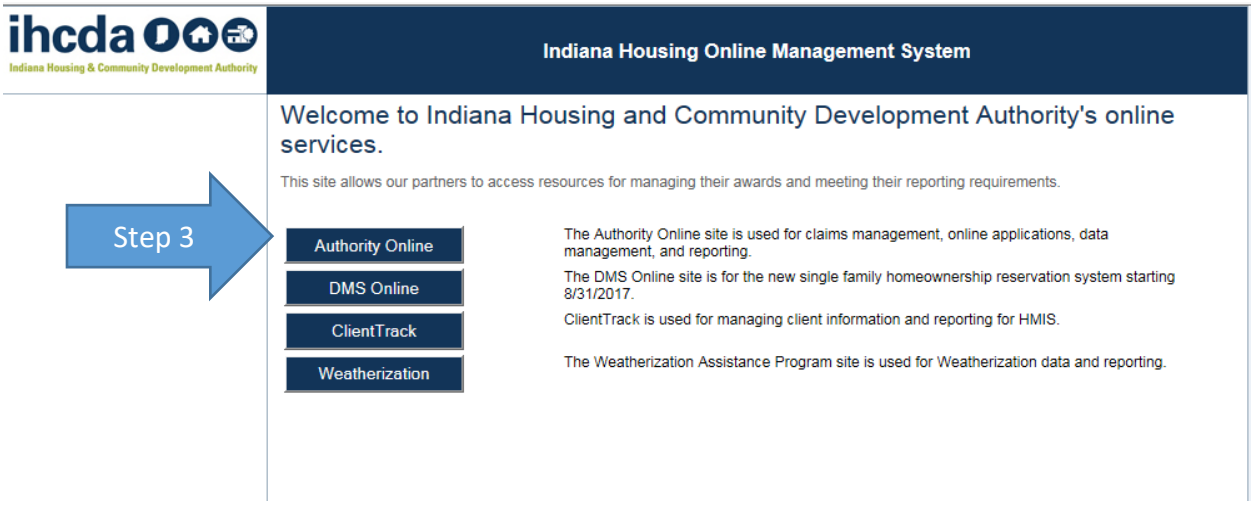
Step 1: Gather all donations received between January 1 and March 31. Agencies should be collecting donor information as they donate, so a list can be ready for the benchmark report. Before submitting a report, it's a good practice to review the information to ensure it is correct.

You will need their name, social security number, the dollar amount donated and the date of the donation.

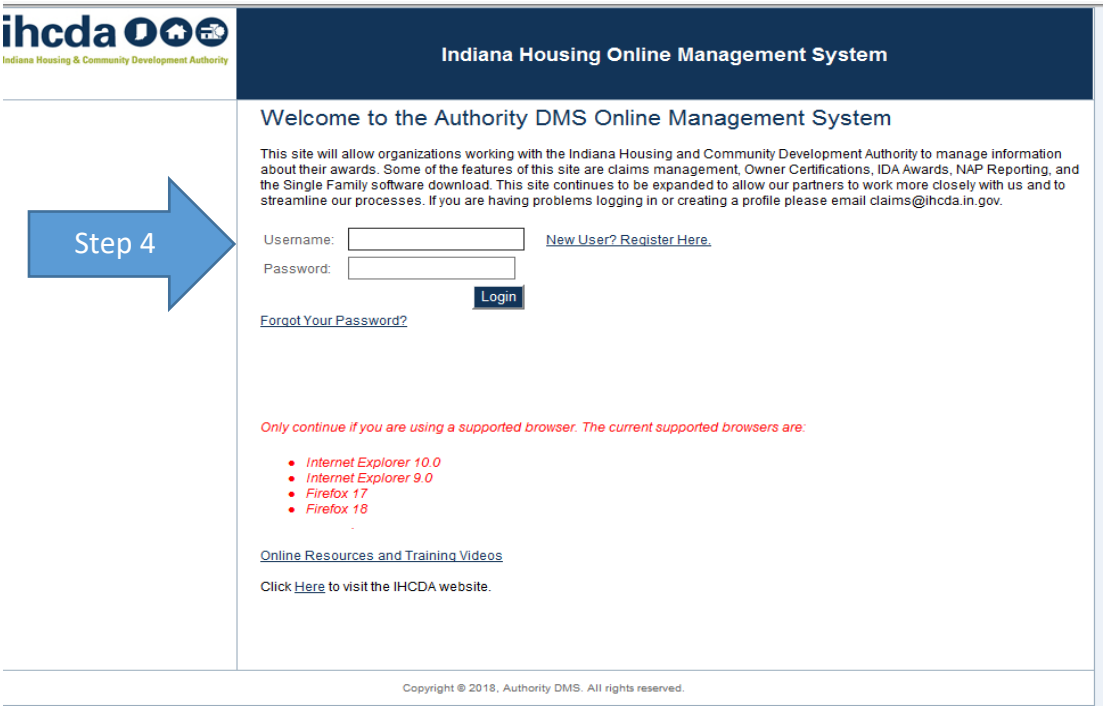
Please note there is no form that you are required to submit to IHCDA. Submitting the 100% Benchmark Report in IHCDAOnline is the only donor information that IHCDA requires. However, agencies should keep copies of the Donor Contribution Form for each donation.

Step 2: Access the **Online.IHCDA.in.gov** website

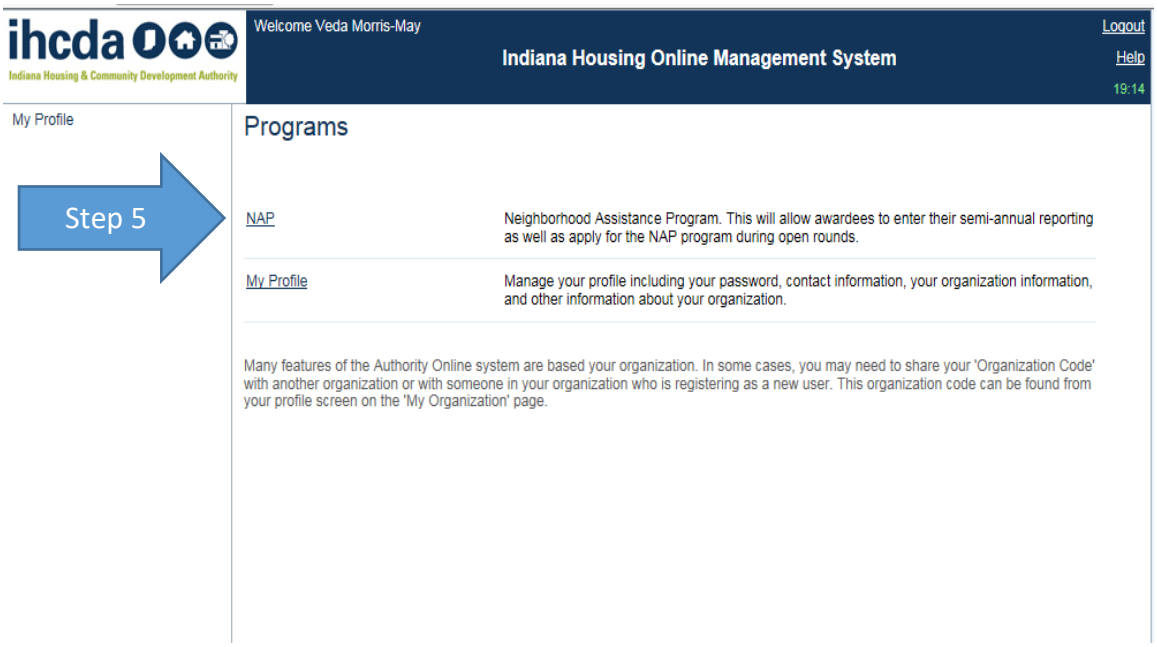
Step 3: Click on "Authority Online"



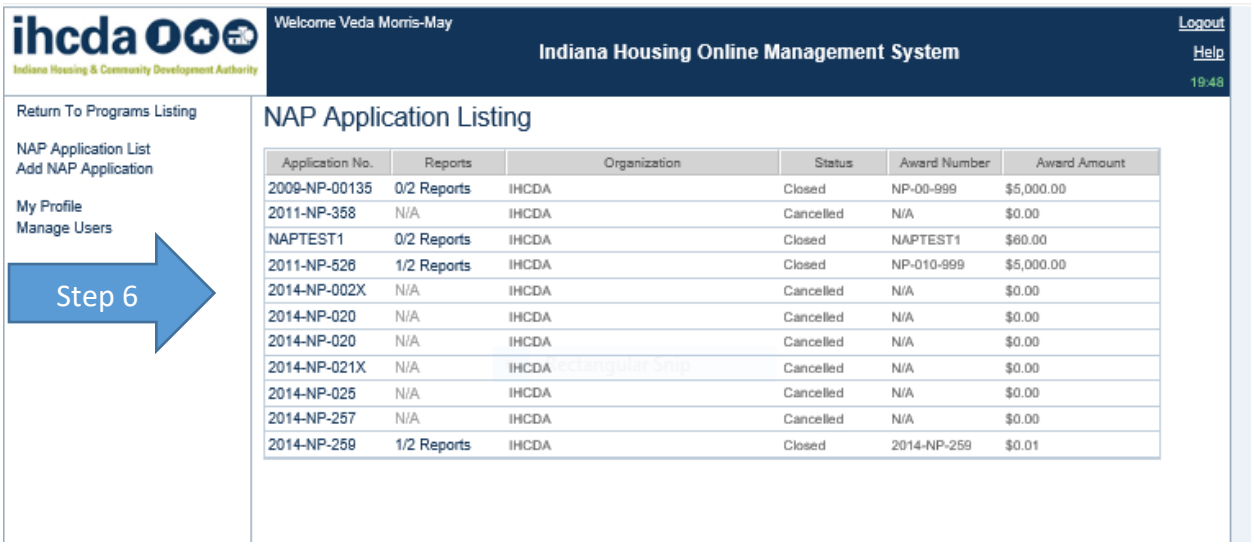
Step 4: Enter Log-in information -“Username” and “Password”



Step 5: Select NAP. This page may look different depending on the types of awards and contracts the organization has with IHCDA.



Step 6: Choose the correct NAP Contract from the list

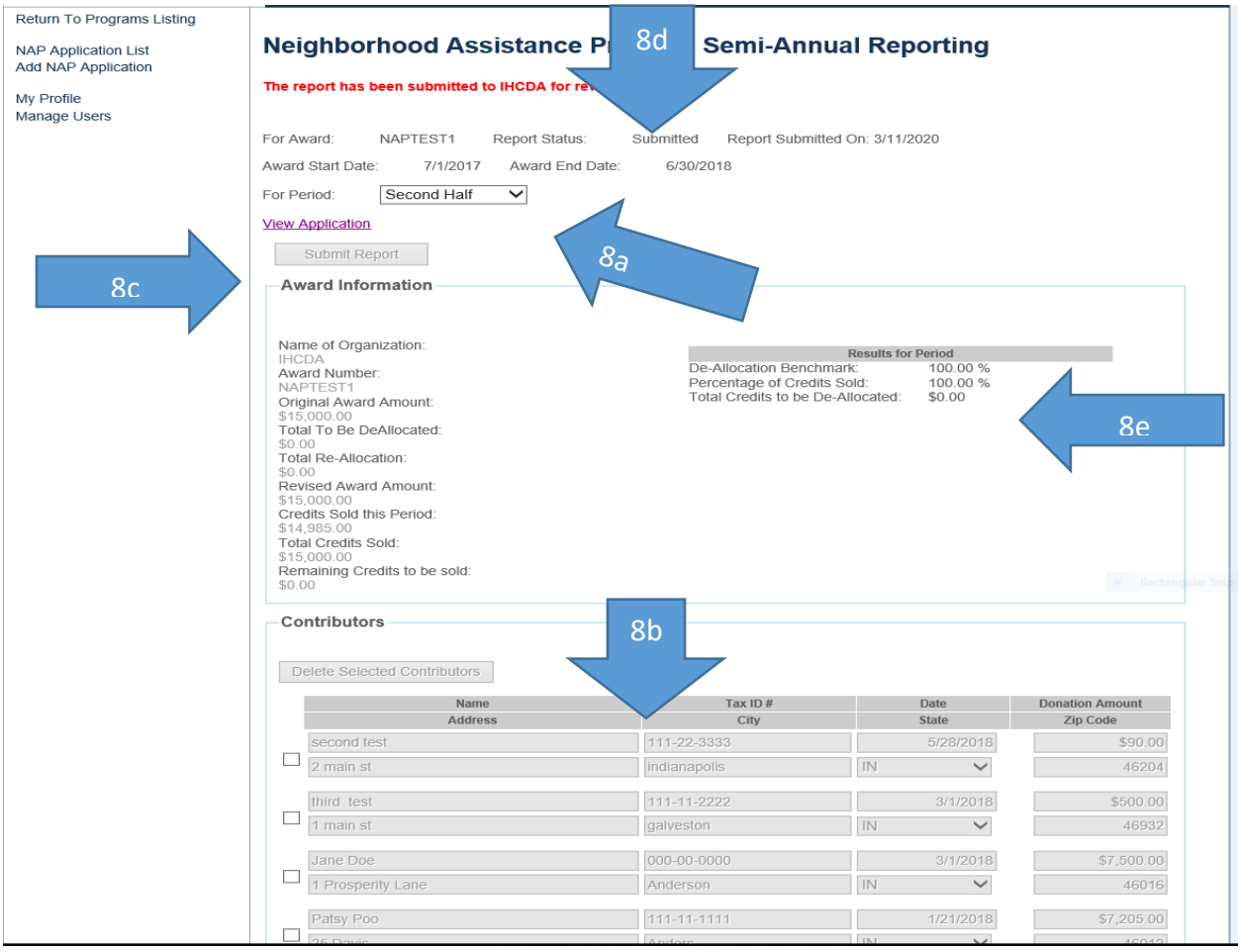


This will bring you to your agency's cover page for your NAP your agency's NAP application's cover page

Step 7: Select NAP Semi-Annual reporting

Step 8: Fill out the report

a) The period for the 100% Benchmark report is "Second Half." **Do not enter names unless the donation was made after January 1.** To access the second half report you have to change the "For Period" drop down to Second Half.
b) Enter the contribution information for each donor and **double check that the information entered is correct.** Incorrect information could put your donor's tax credit and your organizations NAP eligibility at risk.
    i. Name
    ii. Social Security Number
    iii. Address
    iv. Donation Amount
    v. Donation Date
c) Hit the "Submit Report" once all of the donor information has been entered.
d) The report will show "Submitted" at the top right-hand corner once the process has been completed. **PLEASE CHECK FOR THAT BEFORE EMAILING IHCDA STAFF TO ASK IF YOUR REPORT WAS CORRECTLY SUBMITTED.**
e) Once you hit submit the report will show the results for the period which will show the percentage of credits distributed.



Close-Out Report – Due September 30, 2020

The Expenditure Close-out Report is completed in JotForm via a hyperlink that will be emailed to the Executive Director and the NAP program contact person. The link will be posted to the NAP webpage on IHCDA's partner website as well: https://www.in.gov/ihcda/4109.htm. If the organization does not receive the link and cannot find it on IHCDA's website at least two weeks before the report deadline (given in the NAP manual), that organization should contact IHCDA staff: nap@ihcda.in.gov. Not receiving the link directly will not be an acceptable reason for a late report.

If the organization does not complete the 2020 close-out report by the September 27, 2021 due date, the organization will lose eligibility for three (3) program cycles: 2022-2023, 2023-2024, and 2024-2025 Nap Tax Credits.